



June 19, 2012

Roberta Wagner
State of West Virginia
Department of Administration
Purchasing Division
Building 15
2019 Washington Street East
Charleston, WV 25305-0130

RE: RFQ # EHS13016

Dear Ms. Wagner:

Enclosed please find an original and one copy of our bid on the reference Request for Quotation (EHS13016). The vendor proposed is the West Virginia University Research Corporation on behalf of the National Environmental Services Center (NESC).

Questions regarding this bid may be addressed to Dr. Gerald Iwan, Director of the NESC. Dr. Iwan's contact information is contained in our bid.

Sincerely,

A handwritten signature in cursive script, appearing to read 'Mary Jane Buckland'.

Mary Jane Buckland
Assistant Secretary

MJB/rea
Enclosures

cc: Gerald Iwan, PhD

RECEIVED

2012 JUN 21 AM 9:54

WV PURCHASING
DIVISION

PROPOSAL

Title of Proposal: WV-BPH_DHHR West Virginia Utilities Management Institute

Submitted to: WV Dept. of Health and Human Resources – Bureau for Public Health

Submitted by: West Virginia University Research Corporation

Federal or Entity Identification Number: 550665758

DUNS: 191510239

Institutional Address: Office of Sponsored Programs
886 Chestnut Ridge Road
PO Box 6845
West Virginia University
Morgantown, WV 26506-6845

Telephone: (304) 293-3998
Facsimile: (304) 293-7435

Project Director: Gerald Iwan

Title: Director

Department: National Environmental Services Center

College: National Research Center for Coal and Energy

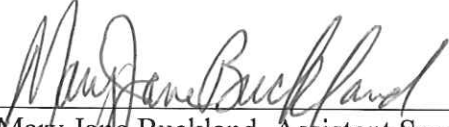
Campus Address: West Virginia University
PO Box 6064
Morgantown, WV 26506-6064

Telephone: (304) 293-6894

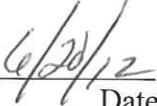
Amount Requested: \$55,940.70

Proposed Starting Date: October 1, 2012

Proposed End Date: September 30, 2013



Mary Jane Buckland, Assistant Secretary
WVU Research Corporation



Date



State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER

EHS13016

PAGE

1

ADDRESS CORRESPONDENCE TO ATTENTION OF:

ROBERTA WAGNER
304-558-0067

RFQ COPY

TYPE NAME/ADDRESS HERE

West Virginia University Research Corp.
886 Chestnut Ridge Road
PO Box 6845
Morgantown, WV 26506-6845

HEALTH AND HUMAN RESOURCES

BPH ENVIRO HLTH SERVICES
350 CAPITOL STREET, ROOM 313
CHARLESTON, WV
25301-1757 304-558-8582

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
05/17/2012				

BID OPENING DATE: 06/21/2012 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
THE STATE OF WEST VIRGINIA AND ITS AGENCY THE DEPARTMENT OF HEALTH AND HUMAN RESOURCES (DHHR), BUREAU PUBLIC HEALTH CENTRAL FINANCE REQUEST A QUOTE TO PROVIDE AN OPEN-END CONTRACT TO COORDINATE AND CONDUCT SIX (6) WEST VIRGINIA UTILITIES MANAGEMENT INSTITUTE TRAINING MODULES PER THE ATTACHED SPECIFICATIONS.						
***BID OPENING:				JUNE 21, 2012 @ 1:30 PM		
LOCATION:				PURCHASING DIVISION, BUILDING #15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305		
001	30	EA	952-90		66.04	1,981.20
COURSE MATERIALS COST PER STUDENT						
TO PROVIDE AN OPEN END CONTRACT FOR THE COORDINATING AND CONDUCTING SIX (6) WEST VIRGINIA UTILITIES MANAGEMENT INSTITUTE TRAINING MODULES PER THE ATTACHED SPECS.						
SEE LINE ITEMS 2 THRU 7 NOTED BELOW						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE

Assistant Secretary

FEIN

55-0665758

TELEPHONE

304-293-3998

DATE

6/20/12

ADDRESS CHANGES TO BE NOTED ABOVE

IF RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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EXHIBIT 3						
LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE UPON AWARD AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.						
UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT BY THE STATE OF WEST VIRGINIA, ITS AGENCIES, OR POLITICAL SUBDIVISIONS, THE TERMS, CONDITIONS, AND PRICING SET FORTH HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.						
RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.						
CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICE						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Margaret Buckner</i>	TELEPHONE 304-293-3998	DATE 6/20/12
TITLE Assistant Secretary	FEIN 55-0665758	ADDRESS CHANGES TO BE NOTED ABOVE

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<p>SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY THE STATE SPENDING UNIT. IT IS UNDERSTOOD AND AGREED THAT THE CONTRACT SHALL COVER THE QUANTITIES ACTUALLY ORDERED FOR DELIVERY DURING THE TERM OF THE CONTRACT, WHETHER MORE OR LESS THAN THE QUANTITIES SHOWN.</p> <p>ORDERING PROCEDURE: SPENDING UNIT(S) SHALL ISSUE A WRITTEN STATE CONTRACT ORDER (FORM NUMBER WV-39) TO THE VENDOR FOR COMMODITIES COVERED BY THIS CONTRACT. THE ORIGINAL COPY OF THE WV-39 SHALL BE MAILED TO THE VENDOR AS AUTHORIZATION FOR SHIPMENT, A SECOND COPY MAILED TO THE PURCHASING DIVISION, AND A THIRD COPY RETAINED BY THE SPENDING UNIT.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p>THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES</p>						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE <i>Mary Jane Buckland</i>				TELEPHONE		DATE 6/20/12
TITLE Assistant Secretary		FEIN 55-0665758		ADDRESS CHANGES TO BE NOTED ABOVE		

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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.						
REV. 01/17/2012						
ANY INDIVIDUAL SIGNING THIS BID IS CERTIFYING THAT: (1) HE OR SHE IS AUTHORIZED BY THE BIDDER TO EXECUTE THE BID OR ANY DOCUMENTS RELATED THERETO ON BEHALF OF THE BIDDER, (2) THAT HE OR SHE IS AUTHORIZED TO BIND THE BIDDER IN A CONTRACTUAL RELATIONSHIP, AND (3) THAT THE BIDDER HAS PROPERLY REGISTERED WITH ANY STATE AGENCIES THAT MAY REQUIRE REGISTRATION.						
INQUIRIES: WRITTEN QUESTIONS SHALL BE ACCEPTED THROUGH CLOSE OF BUSINESS ON 06/05/2012. QUESTIONS MAY BE SENT VIA USPS, FAX, COURIER OR E-MAIL. IN ORDER TO ASSURE NO VENDOR RECEIVES AN UNFAIR ADVANTAGE, NO SUBSTANTIVE QUESTIONS WILL BE ANSWERED ORALLY. IF POSSIBLE, E-MAIL QUESTIONS ARE PREFERRED. ADDRESS INQUIRIES TO: ROBERTA WAGNER DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25311 FAX: (304) 558-4115 E-MAIL: ROBERTA.A.WAGNER@WV.GOV						
PURCHASING CARD ACCEPTANCE: THE STATE OF WEST VIRGINIA CURRENTLY UTILIZES A VISA PURCHASING CARD PROGRAM WHICH IS ISSUED THROUGH A BANK. THE SUCCESSFUL VENDOR MUST ACCEPT THE STATE OF WEST VIRGINIA VISA PURCHASING CARD FOR PAYMENT OF ALL ORDERS PLACED BY ANY STATE						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
<i>Mary Jane Buckland</i>	304-293-3998	6/20/12
TITLE	FAX	ADDRESS CHANGES TO BE NOTED ABOVE
Assistant Secretary	55-0665758	

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AGENCY AS A CONDITION OF AWARD.						
EXHIBIT 4						
LOCAL GOVERNMENT BODIES: UNLESS THE VENDOR INDICATES IN THE BID HIS REFUSAL TO EXTEND THE PRICES, TERMS, AND CONDITIONS OF THE BID TO COUNTY, SCHOOL, MUNICIPAL AND OTHER LOCAL GOVERNMENT BODIES, THE BID SHALL EXTEND TO POLITICAL SUBDIVISIONS OF THE STATE OF WEST VIRGINIA. IF THE VENDOR DOES NOT WISH TO EXTEND THE PRICES, TERMS, AND CONDITIONS OF THE BID TO ALL POLITICAL SUBDIVISIONS OF THE STATE, THE VENDOR MUST CLEARLY INDICATE SUCH REFUSAL IN HIS BID. SUCH REFUSAL SHALL NOT PREJUDICE THE AWARD OF THIS CONTRACT IN ANY MANNER.						
REV. 3/88						
NOTICE						
A SIGNED BID MUST BE SUBMITTED TO:						
DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130						
THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:						
SEALED BID						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Mary Jane Buckner</i>	TELEPHONE 304-293-3998	DATE 6/20/12
TITLE Assistant Secretary	FAX 55-0665758	ADDRESS CHANGES TO BE NOTED ABOVE

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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
				BUYER:		
				RFQ. NO.:		
				BID OPENING DATE:		
				BID OPENING TIME:		
				PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID:		
				304-293-3161		
				CONTACT PERSON (PLEASE PRINT CLEARLY):		
				Gerald Iwan		
002	30	EA	952-90		490.54	14,716.20
				MODULE ONE - COST PER STUDENT		
003	30	EA	952-90		327.03	9,810.90
				MODULE TWO - COST PER STUDENT		

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE

TELEPHONE

304-293-3998

DATE

6/20/12

TITLE

Assistant Secretary

FAX

55-0665758

ADDRESS CHANGES TO BE NOTED ABOVE

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004	30	EA	952-90		327.03	9,810.90
	MODULET THREE - COST PER STUDENT					
005	30	EA	952-90		327.03	9,810.90
	MODULE FOUR - COST PER STUDENT					
006	30	EA	952-90		163.51	4,905.30
	MODULE FIVE - COST PER STUDENT					
007		EA	952-90		163.51	4,905.30
	MODULE SIX - COST PER STUDENT					

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE

TITLE Assistant Secretary

FEIN

55-0665758

TELEPHONE

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GENERAL RESPONDING TO REQ. INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

EHS13016-West Virginia Utilities Management Institute**BACKGROUND**

Safe, reliable drinking water is essential to the protection of public health. Drinking water systems face many challenges in meeting the public health protection standards that ensure safe drinking water. Properly trained utility managers are essential to ensure that West Virginia's drinking water systems remain viable.

Most public drinking water systems in West Virginia serve 10,000 or fewer customers; these small systems frequently have a limited understanding of the requirements to properly manage, fund, and operate their water system because they cannot afford to hire experienced utility managers.

Drinking water systems that are not properly managed experience:

- Deteriorated infrastructure
- Increased water loss
- Increased operating expenses
- Poor customer service
- Unreliable operation
- Health threats from unsafe drinking water

The Bureau for Public Health (BPH) implements West Virginia's Capacity and Development Program (CDP) with the mandate of helping West Virginia water systems acquire and maintain the Technical, Managerial, and Financial (TMF) capacities necessary to meet the requirements of public drinking water statutes and regulations. The BPH developed a 6-module training program, the "West Virginia Utility Management Institute (WVUMI)," to provide utility personnel with the information and technical skills necessary to improve TMF capacities for their system. The Bureau for Public Health is seeking a vendor with knowledge of and five (5) years experience in working with water utilities to participate in an open end contract to conduct the 6 module training course for utility managers.

EHS13016-West Virginia Utilities Management Institute(WVUMI)Deliverables to be Performed by Vendor

The successful vendor shall perform the specified mandatory deliverables according to specifications and within the time frame specified.

Deliverables

- I. Vendor shall arrange and conduct six (6) modules of training of the program "West Virginia Utility Management Institute" (WVUMI) within twelve (12) months of the award of the contract. The vendor will provide the Office of Environmental Health the training schedule within sixty (60) days of the award of the contract, with the first class starting within ninety (90) days of the award of the contract.
 - a. The instruction facility must be a classroom scenario .
 - b. Modules shall vary in days of training necessary to complete said modules:
 - i. Module 1-Three (3) days
 - ii. Module 2-Two (2) days
 - iii. Module 3-Two (2) days
 - iv. Module 4-Two (2) days
 - v. Module 5-One (1) day
 - vi. Module 6-One (1) day
 - c. Vendor will provide all equipment necessary for presenting the course including, but not limited to:
 - i. Audio-Visual Equipment
 - ii. Training Aids and Props (Reference attached "List of Training Aids and Props Provided by Vendor for each WVUMI Module" in this RFQ for supplies required.)
 - d. Vendor will provide three (3) ring binder of printed course material for each student.
 - e. The master copies of the course material will be provided to the low bid successful vendor. (Reference "Module Training Materials to be Printed by Vendor for Each Participant" in this RFQ for bidding purposes the number of copies of slides and handouts is provided.)
 - f. Outsourced publications must be obtained and provided by vendor for each participant. (Reference "WVUMI "List of Publications to be Obtained by Vendor and Copies Provided to each Participant" in this RFQ.)

Attached to this RFQ is "Trainer's Information for the West Virginia Utility Management Institute" as an overview of the six modules to reference materials and props.

- II. In addition to providing a training schedule to the Office of Environmental Health Services within sixty (60) days of the award of contract, the vendor will also:
 - a. Advertise course availability by posting schedule on its website. The posting will be available on the website within five days of submission of the training schedule to Office of Environmental Health Services and remain posted until ten (10) days prior to the first module.
 - b. Develop and distribute one printed mass mailing to target public water system audience.
 - c. Register participants in the WVUMI training course, method of registration is to be chosen by the vendor.

- III. West Virginia Utility Management Institute Training must be held according to the days required for:
 - One day modules will be on held Saturday
 - Two day modules will be held Saturday-Sunday
 - Three day modules will be held Friday-Saturday-Sunday

- IV. The modules will be offered at no cost to the participants. The participants will be responsible for their own travel, lodging, and meals. Vendor shall provide lunch on training day.
 - a. Vendor will develop and provide sign in sheets, (photo identification required) for each day of each module.
 - b. Vendor will provide copies of sign in sheets to Office of Environmental Health Services within 30 days following module completion.

- V. Each module will have six to six and one half (6-6½) hours of instruction in one (1) day with one (1) fifteen (15) minute break in the morning and one (1) fifteen (15) minute break in the afternoon. Lunch will last at least forty-five (45) minutes and no longer than sixty (60) minutes.
 - a. Vendor will provide beverages, (coffee, tea, water, soft drinks, creamers, sugars, sugar substitute) at the beginning of the training days, and will have the drinks refreshed and restocked for both breaks.
 - b. Vendor will provide lunch. Lunch will consist of a minimum of choices of deli-style sandwiches including:
 - Meats
 - Breads
 - Cheeses
 - Lettuce
 - Tomatoes
 - Condiments
 In addition to deli-style sandwiches, lunch will include a minimum of:
 - Chips

Beverages (coffee, tea, water, soft drinks, creamers, sugars, sugar substitute)

Dessert

- VI. Participants must complete all training days of all six (6) modules to successfully complete the WVUMI training program.
 - a. Upon successful completion of each module, and entire course, the vendor will develop and distribute certificates of completion and course evaluation forms to each participant within 30 days of module and course completion. Please note: Any participant that does not complete modules in full will not be considered as successfully completing the WVUMI training program, there are no "make-up" sessions taken into consideration at this time. Participants that do miss a module(s) are encouraged to continue and finish remaining modules of the course.
 - b. Course evaluation forms will be submitted to Office of Environmental Health Services with invoice within 30 days of course completion.
- VII. Vendor will schedule each WVUMI module per the following criteria:
 - a. Each session will be restricted to thirty (30) students maximum, five (5) students minimum. Enrollment will be based on a first come, first serve basis upon registration for the course.
 - b. Vendor will make provisions, i.e. training materials, meals, hospitality, for one Office of Environmental Health Services employee that will monitor each module, at the OEHS office discretion.
 - c. If the minimum number of participants is not obtained through pre-registration seven (7) calendar days prior to a scheduled module, the Office of Environmental Health Services reserves the right to cancel the module.
- VIII. Vendor will provide an instructor(s) for conducting WVUMI training modules meeting the following criteria:
 - a. A minimum of five (5) years employment in the drinking water industry to demonstrate background knowledge of water system operations and management, including asset management, capital improvement planning, budgeting, personnel, standard operating procedures, operations and maintenance planning.
 - b. A minimum of one (1) year classroom instruction experience. Vendor must submit documentation of instructor resume with signed Request for Quotation.

OEHS Contribution to Deliverables

- I. Provide upon request, information for mass mailing to the vendor.
- II. Provide six (6) module electronic, CD format and hard copy binder training material master set to the vendor.

Vendor Registration

The successful vendor must be in good standing with the WV Secretary of State's office, the WV Bureau of Employment for Employment Programs and be registered with the State of WV, Division of Purchasing before a purchase order can be issued. Registration with the Secretary of State's office and Purchasing Division is not required to submit a bid.

Invoicing

Upon award, the successful vendor will submit invoices in arrears, to the Office of Environmental Health Services at the address on the face of the purchase order labeled "Invoice To" pursuant to the terms of the contract. The invoices will be in a form approved by the Office of Environmental Health Services and will include a breakdown of costs, attendance sign-in sheets and completed course evaluations. The vendor will be responsible for payment of all subcontracts, staff and any other staff contracted to provide services. State law forbids payment of invoices prior to receipt of services. The Office of Environmental Health Services reserves the right to reject any or all invoices for which proper documentation has not been provided. The vendor will be notified of deficiencies within fifteen (15) days of receipt of the invoice.

Record Retention (Access and Confidentiality)

Vendor shall comply with all applicable Federal and State of West Virginia rules and regulations, and requirements governing the maintenance and documentation to verify any cost of services or commodities rendered under this contract by vendor. The vendor shall maintain records a minimum of five (5) years and make available all records to the Office of Environmental Health Services personnel at vendor's location during normal business hours upon written request by the Office of Environmental Health Services within ten (10) days after the receipt of the request.

Notice

- I. Partial quotations will not be considered. Vendor must be able to provide all deliverables.
- II. Vendor must provide its instructor(s) drinking water industry employment and classroom instruction experiences as referenced under Deliverables VIII a-b.
- III. Vendor's quotation shall include a breakdown of costs on the attached "Cost Sheet" per the following criteria:
 - a. Price per student for course materials.
 - b. Price per student for each of the six (6) modules.
- IV. Award will be based on lowest bidder meeting all specifications.

EHS13016List of Training Aids and Props Provided by Vendor for each WVUMI Module:**Module 1**

- **Day 1**
 - Large map of West Virginia (minimum 4'x4')
 - Small removable dot labels in 4 colors
 - Clear glass of water
 - 12" Inflatable earth balloon or ball
 - Clear measuring cup
 - 1 liter beaker
 - 10 ml graduated cylinder
 - An eye dropper
 - Computer with Internet access and projector for viewing of "You Tube Video"
 - Bowl of almonds
- **Day 2**
 - Large Map of West Virginia (minimum 4'x4')
 - Smallest post-It notes in 4 colors
 - Cards of "The Roles We play" on colored paper or card stock
 - Self-sticking, removable labels in 2 colors (preferable red and green)
 - Most recent rates for WV water and wastewater utilities, available on WV Public Service Commission website
- **Day 3**
 - Table or bulletin board to display customer communications materials
 - Clear glass of water
 - Flip chart or White board and markers
 - Examples of effective public relations materials developed for or by a small utility
 - Examples of American Water Works Association bill stuffers or equivalent from another source

Module 2

- **Day 1**
 - Large map of West Virginia (minimum 4'x4')
 - Small, removable dot labels in 4 colors
 - Examples of any brochures and/or fact sheets on selected water and wastewater grant and loan programs, as available
 - Trainer's Manual for West Virginia Utility Management Institute 101 course
- **Day 2**
 - Trainer's Manual for West Virginia Utility Management Institute 101 course

Module 3

- **Day 1**
 - **Trainer's Manual for West Virginia Utility Management Institute 101 course**
 - **Large map of West Virginia (minimum 4'x4')**
 - **Web accessible computer linked to a projector to overview software**
 - **CUPSS (Check Up Program for Small Systems) Software**
- **Day 2**
 - **WV Purchasing Division Procedures Handbook**

Module 4

- **Day 1**
 - **Bulletin board**
 - **Push pins**
 - **4"x6" Index cards**
 - **Pens**
 - **Trainer's Manual for West Virginia Utility Management Institute 101 course**
 - **A Guide to the WV Ethics Act**
- **Day 2**
 - **Bulletin board**
 - **Map of West Virginia (minimum 4'x4')**
 - **Push pins**
 - **4"x 6" Index cards**
 - **Pens**
 - **Development Guidelines for Personnel Policies and Procedures – Kentucky Rural Water Association**
 - **Trainer's Manual for West Virginia Utility Management Institute 101 course**

Module 5

- **Trainer's Manual for West Virginia Utility Management Institute 101 course**
- **Bulletin board**
- **Push pins**
- **Index cards**
- **Pens**

Module 6

- **Bulletin board (labeled public relations)**
- **Push pins**
- **Trainer's Manual for West Virginia Utility Management Institute 101 course**
- **Public Relations for Rural and Small Water Systems – National Rural Water Association**
- **The Water Board Bible: The Handbook of Modern Utility Management – Kansas Rural Water Association**

EHS13016Module Training Materials to be Printed by Vendor for each Participant**Module 1:**

- **Day 1**
 - 49 slides with 3 slides per printed page, double sided pages = 9 pages
 - 6 handouts = 9 pages
- **Day 2**
 - 28 slides with 3 slides per printed page, double sided pages = 5 pages
 - 3 handouts with a total of 14 pages, double sided pages = 7 pages
- **Day 3**
 - 26 slides with 3 slides per printed page, double sided pages = 5 pages
 - 4 handouts with a total of 6 pages = 3 pages
 - References: 7 pages with double sided pages = 4 pages
 - Evaluation: one 2 sided page = 1 page

Module 2:

- **Day 1**
 - 68 slides with 3 slides per printed page, double sided pages = 12 pages
 - 1 handout, 2 sided = 1 page
- **Day 2**
 - 48 slides with 3 slides per printed page, double sided pages = 8 pages
 - 2 handouts with a total of 3 pages, double sided pages = 2 pages
 - References: 4 pages, double sided pages = 2 pages
 - Evaluation: one 2 sided page = 1 page

Module 3:

- **Day 1**
 - 52 slides with 3 slides per printed page, double sided pages = 7 pages
 - 1 handout, 5 pages in length, double sided pages = 3 pages
- **Day 2**
 - 38 slides with 3 slides per printed page, double sided pages = 7 pages
 - 5 handouts with a total of 10 pages, double sided pages = 5 pages
 - References: 2 pages with 2 sided = 1 page
 - Evaluation: one 2 sided page = 1 page

Module 4:

- **Day 1**
 - 43 slides with 3 slides per printed page, double sided pages = 8 pages
 - 9 handouts with a total of 12 pages, double sided = 6 pages

- Utility Job Descriptions (listed as optional but required for distribution): 14 pages, double sided pages = 7 pages
- Day 2
 - 22 slides with 3 slides per printed page, double sided pages = 4 pages
 - 10 handouts with a total of 20 pages, 2 sided pages = 10 pages
 - References: 1 page
 - Evaluation: 1 double sided page = 1 page

Module 5

- 35 slides with 3 slides per printed page, double sided pages = 6 pages
- 7 handouts with a total of 15 pages, 2 sided pages = 7 pages
- References: 4 pages, 2 sided = 2 pages
- Evaluation: one 2 sided page = 1 page

Module 6

- 23 slides with 3 slides per printed page, double sided pages = 4 pages
- 3 Handouts with a total of 4 pages, double sided pages = 2 pages
- References: 1 page
- Evaluation: one 2 sided page = 1 page

Total 154 Pages

Trainer's Information for the West Virginia Utility Management Institute

The Utility Management Institute is a six-module training curriculum intended to be used by trainers to provide 11 days of training to managers of drinking water and wastewater systems in West Virginia. The course manuals are intended to be used by trainers. They include background information on the topics to be discussed, lists of materials needed by the trainer, materials needed by the students, copies of handouts, and thumbnails of the PowerPoint slides. Materials are arranged in the order of presentation. Additional information for trainers is included in the manuals.

Electronic files are included on CDs that accompany the manuals. The electronic files include: PowerPoint files of all supporting slide presentations, PDFs of the modules (in two forms, high resolution files that can be used to print the modules and compressed files that are more suitable for emailing), and reference materials (in PDF or Word form are also included for each module).

Students are intended to receive copies of the handouts identified in the manuals, copies of all PowerPoint slides with room for notes, and copies of the Reference/Resources section for each course plus any supplemental materials. Trainers can choose to put together course binders ahead of time or pass out materials during the class so long as the materials are already hole punched.

It should be noted that the courses, as currently structured, rely on a set of supplemental booklets that are not currently available electronically. These include the five booklets of the Water Board Bible series developed by the Kansas Rural Water Association (KRWA). They are available through the KRWA website at: <http://www.krwa.net/krwa/estore/store.asp>, phone: 785-336-3760. They are also available through Amazon. Some of the booklets are used in more than one course. Other materials available only in paper include the National Rural Water Association publication, "Water Rates: Information for Decision Makers," available through the National Environmental Services Center. Call 800-624-8301 to request product number DWBLTR05. Trainers can print the PSC rules pertinent to water and wastewater utilities using the files included on the CDs.

The following lists provide suggested supplies and materials needed by the trainer; materials needed by the students; and materials or information participants are requested to bring to class. The latter category may include booklets that students received in a previous class or information about their utilities, such as a copy of their Consumer Confidence Report or current rates, for purposes of discussion. The attachments are intended to provide trainers a consolidated list of information on what materials are needed for all the courses.

West Virginia Utility Management Institute

List of publications to be obtained by vendor and copies provided to each participant:

- *The Water Board Bible: The Handbook of Modern Utility Management*
- *Financial Accounting Guide for Small Water Utilities* (Vol. 3 of Water Board Bible series)
- *Water Rates: Information for Decision Makers: Rural and Small Systems Training Guide* (NRWA)
- *Practical Personnel Management for Small Systems* (Vol. 2 of Water Board Bible series)
- *A Guide to WV Ethics Act* – downloadable through the WV Ethics Commission website
- *Customers and You: Practical Communications for Small Systems* (Vol. 4 of Water Board Bible series)
- *Summary of West Virginia Public Service Commission*
- *National Characteristics of Drinking Water Systems serving Populations Under 10,000* – US EPA publication
- *Community Water System Survey, Vol. 1, Overview* – US EPA publication
- *Factoids: Drinking Water and Ground Water Statistics* – US EPA Publication
- *Getting Results from Your Experts* – Vol. 5 in the Water Board Bible Series
- 64CSR4, "Public Water System Operator Regulations"
- 64CSR5, "Wastewater Treatment Works and Operators"

List of publications included in the training packet to be copied and provided to each participant:

- NESC Tech Brief, "Treatment Technologies for Small Drinking Water Systems" (Note: 2 pages)
- NESC Tech Brief, "Filtration" (Note: 4 pages)
- NESC Tech Brief, "Membrane Filtration" (Note: 8 pages)
- West Virginia's Capacity Development Strategy (Note: 78 pages)

**EHS13016 West Virginia Utilities Management Institute
Cost Quotation Sheet**

0020

Quotation Based on Maximum 30 Students		Unit price per student Student total cost	
Course Materials Cost Per Student	30	\$ 66.04	\$ 1,981.20
Module One (1) Cost Per Student	30	\$ 490.54	\$ 14,716.20
Module Two (2) Cost Per Student	30	\$ 327.03	\$ 9,810.90
Module Three (3) Cost Per Student	30	\$ 327.03	\$ 9,810.90
Module Four (4) Cost Per Student	30	\$ 327.03	\$ 9,810.90
Module Five (5) Cost Per Student	30	\$ 163.51	\$ 4,905.30
Module Six (6) Cost Per Student	30	\$ 163.51	\$ 4,905.30
Grand Total (Training Materials + Six (6) Modules) per Student Evaluation Based on Maximum Capacity of 30 Students			\$ 55,940.70

Vendor with the low bid, meeting specifications will be awarded the contract.

Vendor Name WVU Research Corp.

Signature



Vendor Contact Mary Jane Buckland

Date



Vendor Telephone 304-293-3998

Vendor Email: WVUSponsoredPrograms@mail.wvu.edu

Vendor Fax 304-293-7435

Vendor Remit to Address 886 Chestnut Ridge Rd.

Morgantown, WV 26506-6845

State of West Virginia

VENDOR PREFERENCE CERTIFICATE

0021

Certification and application* is hereby made for Preference in accordance with **West Virginia Code**, §5A-3-37. (Does not apply to construction contracts). **West Virginia Code**, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the **West Virginia Code**. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1. Application is made for 2.5% resident vendor preference for the reason checked:

- ☐ Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; or,
- ☐ Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or,
- ☐ Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; or,

2. Application is made for 2.5% resident vendor preference for the reason checked:

- ☐ Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,

3. Application is made for 2.5% resident vendor preference for the reason checked:

- ☐ Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,

4. ☒ Application is made for 5% resident vendor preference for the reason checked:

- ☐ Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; or,

5. Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:

- ☐ Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; or,

6. Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:

- ☐ Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: WVU Research Corp.

Signed: *Mary Jane Buckland*

Date: 6/20/12

Title: Assistant Secretary

*Check any combination of preference consideration(s) indicated above, which you are entitled to receive.

STATE OF WEST VIRGINIA
Purchasing Division

0022

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

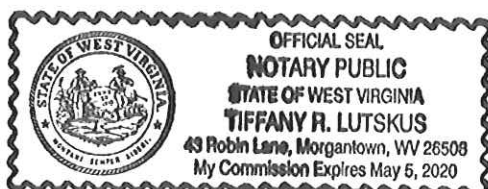
"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code* §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATUREVendor's Name: West Virginia University Research CorporationAuthorized Signature: *[Signature]*Date: 6/20/12State of West VirginiaCounty of Monongalia, to-wit:Taken, subscribed, and sworn to before me this 20 day of June, 2012.My Commission expires May 5, 2020

AFFIX SEAL HERE

NOTARY PUBLIC *[Signature]*

**The West Virginia Utility Management Institute (UMI) Training Program
Quote Submitted by the National Environmental Services Center (NESC)
To West Virginia Bureau for Public Health, June 21, 2012**

Introduction

The National Environmental Services Center (NESC), located at West Virginia University, is a nationally recognized, federally funded, nonprofit organization. With more than 30 years' experience in environmental education, training and community-based assistance, NESC is an active, long-standing protector of the nation's water and public health.

NESC recognizes that safe, reliable drinking water is essential for public health. Drinking water systems face a wide array of challenges in meeting the public health protection standards aimed at ensuring safe drinking water. Because the vast majority of public drinking water systems in West Virginia (WV) serve 10,000 or fewer customers, these smaller systems are often challenged when it comes to obtaining the resources necessary to comply with regulations and provide needed infrastructure. West Virginia's Capacity Development Program (CDP) was designed to assist public drinking water systems acquire and maintain the technical, managerial, and financial (TMF) capacity to meet these challenges.

The Bureau for Public Health (BPH) implements West Virginia's Capacity Development Program (CDP) under U. S. Environmental Protection Agency (EPA) requirement. The CDP's mandated mission is helping West Virginia water systems acquire and maintain the technical (infrastructure), managerial (proper organizational planning, procedures, etc.), and financial (budgeting, rate setting, long-term capital planning, etc.), capacity necessary to comply with public drinking water statutes and regulations.

Proper managerial capacity is integral to achieving adequate water system TMF capacity. Many WV water systems, especially smaller systems, have limited understanding of the capabilities necessary to properly manage, fund, and operate their water system. These systems also often cannot afford to hire utility managers with the experience and expertise needed to identify water system deficiencies and the negative consequences of these deficiencies. Lack of necessary management expertise, and subsequent inadequate TMF capability causes:

- Deteriorated infrastructure,
- Increased water loss
- Increased operating expenses
- Poor customer service
- Unreliable operation
- Unsafe drinking water health threats

NESC's UMI Training Program Approach:

Given the public need, NESC, in response to the RFQ dated 5/17/2012 from WV BPH-Office of Environmental Health Services, proposes to deliver classroom instruction for the comprehensive six-module West Virginia Utility Management Institute (UMI) training program that NESC helped BPH develop in 2008-9.

NESC is a university-based institution. As such, it is ideally situated to provide utility managers and other drinking water utility personnel from small systems (under 10,000 population) with the opportunity to gain knowledge and earn university-based designation in the field of management. It intends to do this by conducting 11 days of classroom training at the National Research Center for Coal and Energy, which is located on the Evansdale Campus of West Virginia University in Morgantown.

NESC's experienced educational training and technical assistance staff will administer the logistics of the six separate sessions; conduct all training and host up to 30 participants per session providing all instruction, equipment, materials, props and on-site meals. Training facilities and meals will be provided by WVU conferencing and catering services for convenience and economy. Much of the accompanying course materials are already available free of charge from NESC's existing product inventory.

NESC's instructors will team-teach the course accompanied by subject matter experts from appropriate state agencies, the university, utilities, and pertinent management disciplines. Having credible presenters and a positive educational environment is key to a successful and professional program outcome.

Finally, NESC's communication and administrative staff will provide the necessary outreach to identify and attract participants, provide the necessary travel and accommodation information, facilitate the venue and work with BPH staff to assure all necessary subject areas are adequately addressed. NESC will also survey participants, record their receptivity to the program, provide needed reports and documentation and assist in the award of certification credits (CEU's).

Goal

The goal of the program is to help, properly educate and train West Virginia water system managers; thereby improving their utility management skills. Highly skilled water system managers will operate viable water systems having adequate TMF capabilities, thereby eliminating public health threats to their customers through, better, more reliable long-term water system operations.

Objective

Deliver a comprehensive WV Utility Management Institute training program in the twelve-month period of October 2012 through September 2013. The schedule will be developed with input from the Office of Environmental Health Services. Final

schedule will be provided within 60 days of award and the first session conducted within 90 days of award. Classes will be conducted on a Friday to Sunday schedule.

1. Activities

NESC will deliver six multi-day, UMI training modules in a classroom setting as follows:

Module 1: Utility Management 101 – 3 day

Module 2: Human Resources Management for Utilities – 2 day

Module 3: Utility Organization, Regulation, and Law – 2 day

Module 4: Utility Finance and Administration – 2 day

Module 5: Modern Technology and Utility Management -1 day

Module 6: Public and Government Relations – 1 day

2. Deliverables

NESC will provide:

1. Six UMI training modules and 11 days of classroom services to a maximum of 30 individuals within a 12-month period.
2. All equipment including AV and training aids and props.
3. Three-ring binders with course materials for all students.
4. Copyright permissions for use of materials.
5. Website advertising and mailings related to course availability and schedules.
6. Registration of all participants with lists and sign-in sheets and course evaluations provided to the Office of Environmental Health Services.
7. Specified meals and breaks.
8. Training schedules and delivery criteria as specified.
9. Provisions for an OEHS employee.
10. Instructors that as a team meet the classroom training criteria

3. Timelines

The course will be conducted between October 2012 and September 2013 per schedule submitted to OEHS within 30 days of award with classes commencing within 90 days of award of the contract. Certificates of completion to be provided within 30 days of course completion and copies of course evaluations delivered to OEHS within 30 days of UMI course completion. NESC is prepared to begin execution of the contract upon award.

Gerald R. Iwan Ph.D.

West Virginia University, PO Box 6064, Morgantown, WV 26505
(304) 293-6894 Gerald.Iwan@mail.wvu.edu

EDUCATION

1969, 1972 and 1983- B.S., M.S., Ph.D. Degrees, Biology, Fordham University, Bronx, NY

Thesis: Population Density, Age Class Composition and Productivity of the Largemouth Black Bass, Micropterus salmoides (Lacepede) in an Unexploited Northeastern Lake

CURRENT POSITION

2008 - West Virginia University, Morgantown, West Virginia

National Environmental Services Center (NESC), Director

Administers over \$1 million annually in EPA and USDA grant funded projects that provide integrated drinking water and wastewater information, research, training, and technical assistance programs to small communities through the nationally recognized NESC, and National Drinking Water and Small Flows Clearinghouses. PI on the EPA SMART about Water program about social marketing that targeted communication through classroom training to 1000 communities in 50 states about addressing wastewater systems and source water protection interrelationships. Directs the State Onsite Regulators Alliance (SORA); the national organization of decentralized wastewater system state regulators.

PRIOR POSITIONS

1988 - 2008 State of Connecticut, Department of Public Health (DPH), Hartford, CT

Chief, Water Supplies Section, and CT Water Planning Council, Liaison

Responsible DPH coordination of CT State drinking water and watershed protection policy, with the Departments of Environmental Protection, Public Utility Control, and Office of Policy and Management. Administered policies, laws, regulations, and water supply operator and capacity development certification trainings the CT Source Water Protection Program, the first to complete EPA Source Water Assessments. Managed over \$10 million annually in U.S. EPA grants including the Drinking Water State Revolving Loan Fund.

1981 - 1988 NYC Department of Environmental Protection, Bureau of Water Supply

Chief, Drinking Water Quality Control Division/ Director of Laboratory/Field Operations

Responsible for the drinking water quality of the City of New York and its compliance with all State and Federal related requirements. Directed drinking water quality operations, the City's first limnology program, and its watershed protection program and monitoring of the NYC reservoirs and drinking water. Advocated for the protection of NYC watersheds through various forums, including the NY Academy of Medicine and led NYC's challenge to the Surface Water Treatment Rule. Authored a paper for the NY Academy of Sciences emphasizing the health and economic importance of protecting the NYC watersheds.

1973 - 1981 Union Carbide Corp. Environmental Services (UCES), Tarrytown, NY

Section Leader, Quality Assurance (1979-1981)

Assured aquatic toxicity and environmental chemistry tests complied with Federal Good Laboratory Practice (GLP) and Quality Assurance (QA) requirements.

Section Leader, On-Site Aquatic Toxicity Testing (1977-9) Assistant Scientist (1973 - 7)

Designed and executed short and long term on-site, effluent aquatic bioassays and aquatic field toxicity studies and investigations in numerous states on industrial wastes and agricultural chemicals. Worked with and provided classroom training for private clients and government regulators on study design, data correlation, reporting and defending results of NPDES and SPDES related on-site aquatic bioassays. Published the results of the first on-site critical life stage bioassay conducted in the U.S. on a complex municipal-industrial effluent. Conducted numerous chronic, partial chronic, embryo-larval, bioconcentration, bioaccumulation and acute aquatic bioassays required for FDA and EPA product safety registration. Conducted EPA studies and authored reports on parathion and phthalate toxicity.

PUBLICATIONS

- Iwan, G. R. 1987. "Drinking Water Quality Concerns of New York City, Past and Present." Annals of the New York Academy of Sciences, Vol. 502, July 2, 1987: 183-204.
- Spacie, A., A. Vilkas, G. F. Doebbler, W. Kuc, and G. R. Iwan. 1981. "Acute and Chronic Parathion Toxicity to Fish and Invertebrates." Union Carbide Environmental Services. EPA-600/3-81-047, Contract EPA-68-01-0155.
- Iwan, G. R. and G. E. Cella, 1980. "On-site Critical Life Stage Bioassay with the Fathead Minnow, *Pimephales promelas*, on Effluent from the Wastewater Treatment Facilities of Austin Minnesota." Proceedings of the 4th ASTM Conference on Aquatic Toxicology and Hazard Assessment. ASTM STP737 (1981); 312-323.
- Iwan, G. R. 1976. *Olin-14C Terrazole Channel Catfish, *Ictalurus punctatus* (Rafinesque), Static Bioaccumulation Study*. (Unpublished study, cited in U.S. EPA Pesticide Registration Standard, 5-Ethoxy-3-trichloromethyl-1, 2, 4-Terrazole, September 1980).

SUPPLEMENTAL EXPERIENCE

- Course Instructor. Fordham Univ., Mt. St. Vincent, and Manhattan Colleges, Bronx, NY, 1970-73.
- Environmental Consultant to the Towns of Southampton and North Castle, NY.
- Fisheries Research under Ford Foundation Grant #729-0013.
- Adjunct Prof., UMass, Amherst MA, Distance Learning, *Principles of Public Health Practice*, 2002 -4.
- Association of State Drinking Water Administrators (ASDWA) -Delegate to Bonn Germany Conferences I and II (2001 and 2004), for the WHO and EU *Charter on Drinking Water*.
- Conducted national classroom Water Infrastructure Security Training for ASDWA, 2008 .
- Lectured at numerous National Symposia including AWWA, ASDWA, American Society of Microbiology, National Water Pollution Control Federation and American Society for Testing and Materials (ASTM).
- Guest lecturer and instructor at Universities including Columbia, Yale, University of Massachusetts, University of Connecticut, UCONN Medical Center and West Virginia University (WVU), 1981-2012.
- Taught segments on water at the WVU Center for the Advancement of Leadership Skills, 2009 and the WVU Local Government Leadership Academy, 2011.

CERTIFICATIONS, HONORS and MEMBERSHIPS

- Elected Fellow of the New York Academy of Medicine, 1995.
- State of Connecticut, Excellent Managerial Award, 1990.
- New York State Department of Health Laboratory Director, 1982 - 1988.
- 2nd Place Poster, 4th ASTM Conference on Aquatic Toxicology, Chicago, 1979.
- Andrew J. Boehm Fellowship Award for Work in Fisheries Sciences, 1975.
- Fellow, New York Academy of Medicine: Work Group on Drinking Water Quality, 1985-1988 .
- American Water Works Association / Association of Metropolitan Water Agencies, Technical Advisory Groups, 1984 -91 and Chair of Workgroup on Contaminant Listing.
- Association of State Drinking Water Administrators, 1988 – 2008, Chair of Security and Source Water Protection Committees and member of the Board of Directors, (2006-2008).
- Department of Homeland Security Government Coordinating Council (GCC), 2005 - 2008.
- WaterISAC, past member of Board of Directors, 2006 - 2008.
- Columbia University Seminars on Pollution and Water Resources, 1982-2012.
- New York Academy of Sciences - Environmental Sciences Section 1982-88.
- NYC Mayor's Task Force, Use of the Hudson River Water and Watershed Protection, 1986-88.

SANDRA FALLON

West Virginia University, PO Box 6064, Morgantown, WV 26505
(304) 293-6897 Gerald.Iwan@mail.wvu.edu

SUMMARY OF QUALIFICATIONS

Master's Degree in Technology Education with strong experience in adult education and training; strategic planning and project management; water and wastewater issues; rural and small community audiences and training needs.

EDUCATION

Master's Degree, Technology Education, 1995. West Virginia University

Emphasis in communication/information systems, education theory, and instructional design.

Bachelor Degree, Broadcast Journalism, 1977. The Pennsylvania State University

Emphasis in news writing, film and video production, and photojournalism.

PROFESSIONAL EXPERIENCE

Training Specialist; National Environmental Services Center (NESC), West Virginia University, Morgantown, WV; December 1997 – Present

Manage, design, develop, implement, and evaluate formal and informal training programs for use at the national, state, and local levels; develop informational products/programs; manage outreach activities; provide leadership, coordination, and oversight for external service providers and training teams; write reports and proposals; represent NESC and make presentations at national public health and environmental conferences.

- Develop and manage training programs and products that meet emerging needs or regulatory requirements on topics such as capacity development, security, emergency response, asset management, source water protection, drinking water and wastewater management; these resources at times represent the first and most comprehensive training designed specifically to address small/rural community needs.
- Manage *The Water We Drink* outreach campaign, a joint initiative of the Rural Community Assistance Partnership and NESC, which disseminates media kits and hosts a website featuring free, reprintable magazine articles and resources to raise rural and small community leaders' awareness about water issues, www.nesc.wvu.edu/waterwedrink.
- Provided leadership, coordination, and training services for *SMART About Water: Strategic Management and Available Resources and Technology* (2008-2009), a national training and technical assistance program designed to address source water protection through wastewater management. Web site: www.nesc.wvu.edu/smart.
- Provided leadership and oversight for staff and contractors in designing, developing, and delivering the *National Environmental Training Institute for Small Communities* (2000-2006), a national four-day event designed to provide training, information, and resources for small community environmental professionals and decision makers. The Institute grew to become a nationally recognized event drawing federal, state, and local regulatory personnel, environmental trainers and assistance providers, local officials and others who manage rural and small community drinking water and wastewater infrastructure and services.

Training Consultant; Training Consultants, Inc., Morgantown, WV; September 1993 – November 1997

Project manager and training consultant. Designed and developed skill- and knowledge-based training materials and courses for private and public organizations.

Graduate Research Assistant; West Virginia University; 1991 – 1995

Researcher and instructor for Department of Technology Education; faculty liaison/management services for Mon Valley Tri-State Leadership Academy; researcher and video documentary producer for West Virginia University College of Law.

Video Producer/Director and Small Business Owner; Full Spectrum Video, Morgantown, WV; 1983 – 1993

Owned/operated small video production business specializing in education/training programs.

Video Production Assistant; WNPB-TV, PBS Affiliate, Morgantown, WV; 1978 – 1983

Served as producer, director, lighting director, videographer, editor, and soundperson for public affairs and nightly news programs.

PROFESSIONAL AFFILIATIONS AND ACTIVITIES

- American Water Works Assoc., Small Systems Outreach Services Committee. 2009-Present.
- West Virginia Environmental Education Association. Board Member. 2008-2011.
- West Virginia Commission for National and Community Service, Future Leaders of Watersheds. 2008. Invited to serve on peer review panel to evaluate grant proposals.
- U.S. Environmental Protection Agency's Water Security Partners. Member. 2006-2008.

SELECTED CONFERENCE/WORKSHOP PRESENTATIONS

- Rural Community Assistance Partnership Nat'l Conference (2010); Association of State Drinking Water Administrators Nat'l Conference (2010); American Water Works Association Nat'l Conference (2009). *The Water We Drink: Small Community Outreach Campaign.*
- National Association of Towns and Townships Nat'l Conference (2008). *Federal Perspectives on Rural Drinking Water Security.*
- American Water Works Association Nat'l Conference (2008); Association of State Drinking Water Administrators Nat'l Conference (2007). *A New Look at Water Security: Small System Perspectives on Protecting/Stewarding Fragile Resources.*
- Rural Community Assistance Partnership: Rural Issues and Best Practices Conference (2005). *Integrating Asset Management, Security, and Capacity Development.*
- National Association of Towns and Townships Nat'l Conference (2004). *Emergency Response Planning to Protect Water System Assets and Public Health.*
- National Environmental Health Association Nat'l Conference (2003). *Security Resources for Small Water and Wastewater Systems.*
- Midwest Assistance Program-In-Service Training (2003). *Regulations Addressing Small Water System Security; Drinking Water System Vulnerability Assessment Tools; Financial Resources for Enhancing Small Water System Security.*
- Rural Community Assistance Partnership's Drinking Water Safety and Security: A Train-the-Trainer Course (2003); West Virginia Utility Expo and Conference (2003). *Regulations Addressing Small Water System Security and Emergency Response.*
- Association of State Drinking Water Administrators Nat'l Conference (2002). *Evaluating the Impact of Capacity Development Training.*
- U.S. Environmental Protection Agency (EPA) Region 4&6 Capacity Development Workshop (2001); U.S. EPA Region 1-5 Capacity Development Workshop (2001); Association of State Drinking Water Administrators Nat'l Conference (2000). *Overview of New Training Program "Managing a Small Drinking Water System."*

CRAIG N. MAINS

137 Hoffman Avenue, Morgantown, WV 26505

(304) 599-9564

cmains@mail.wvu.edu

PROFESSIONAL EXPERIENCE

Senior Staff Engineer. National Environmental Services Center, West Virginia University. September 2006 to present.

- Provide technical assistance on small community drinking water and wastewater topics. Assistance is provided to multiple audiences including operators, system managers, engineers, homeowners, and regulators from across the U.S. and internationally.
- Research and write articles for NESC publications including article on the Revised Total Coliform Rule and on controlling biofilms in drinking water distribution systems for *On Tap* magazine. Wrote article on buying or selling a home with a septic system for *Pipeline* magazine.
- Wrote 70-page primer on small community wastewater treatment currently being distributed nationally by the Rural Community Assistance Partnership.
- Revised and updated the Kentucky Utility Management Institute training curriculum for the West Virginia Bureau for Public Health, making it applicable and available for use in West Virginia. The curriculum consists of six training modules representing 11 days of training.

Environmental Training Specialist. National Environmental Training Center for Small Communities (NETCSC), West Virginia University. January 1997 to September 2006.

- Evaluated, updated, and revised NETCSC training materials, which are targeted to small community audiences in the areas of drinking water, wastewater, and solid waste management.
- Scheduled, managed, and presented at training sessions using NETCSC training materials.
- Coordinated the 2006 NETCSC Environmental Training Institute, a four-day conference that provided environmental training to participants from 23 states and the District of Columbia.
- Conducted research and wrote a national training needs assessment focusing on drinking water, wastewater, and solid waste management.
- Managed the development or revision of NETCSC solid waste management related training curricula, including:
 - Solid Waste Management Options
 - Economics and Marketing of Recyclables
 - Reducing Commercial and Industrial Solid Waste
 - Managing Groups and Conflicts for Solid Waste Officials
- Developed a presentation on the Elementary Recycling: A Primer for Small/Rural Communities, presented at the 2005 Virginia Recycling Association annual conference.
- Coordinated the development of training materials for the West Virginia Class II Sewage System Designer/Installer Training Course.
- Coordinated the development of troubleshooting charts for lagoons, rotating biological contactors, and trickling filters.

Writer/Editor. National Environmental Training Center for Small Communities (NETCSC), West Virginia University. August 1993 – January 1997.

- Reviewed and edited environmental training materials developed for NETCSC by contractors. Managed training sessions. Observed and evaluated use of curricula. January 1995 – January 1997.

- Wrote articles and served as managing editor for *E-Train*, a quarterly newsletter with a circulation of 6000, distributed nationally to environmental trainers who work in the areas of drinking water, wastewater, and solid waste management, August 1993 – January 1995.

Research Assistant I. Department of Environmental Microbiology, West Virginia University. October 1989 – July 1992.

- Participated in various research projects including the investigation of the bacterial quality of rural drinking water supplies; isolation and identification of bacteria from drinking water; comparison of Presence-Absence coliform tests with traditional coliform tests; and amelioration of acid mine drainage by cattail wetlands.
- Investigated the effectiveness of point-of-use, activated carbon filters on removing bacteria in non-chlorinated well and spring water.
- Worked on isolating *Acinetobacter* species, an opportunistic pathogen, in well and spring water. Worked on isolating and identifying heterotrophic bacteria in drinking water using Biolog™ system.
- Coordinated preparation of laboratory materials for bacteriology classes. Trained student workers to prepare microbial growth media.
- Conducted numerous types of chemical analyses — gas chromatography (GC), atomic absorption spectroscopy (AAS), use of ammonia analyzers, pH meters, spectrophotometers, and other instruments.
- Conducted numerous types of indicator bacteria quantifications including total coliform, fecal coliform, fecal streptococci, and heterotrophic plate counts (HPC) using both membrane filtration and Most Probable Number (MPN) fermentation tube techniques.
- Responsible for maintenance of departmental equipment, instruments, and laboratory supplies. Instructed new graduate students and student workers in proper use of equipment such as autoclaves, centrifuges, and distilled/deionized water purifiers.
- Maintained departmental pure bacteria stock culture collection, both aerobic and anaerobic.

Laboratory/Research Technologist I. West Virginia University, Dept. of Environmental Microbiology, March 1987 - May 1989.

- Conducted experiments to investigate the microbial degradation of an industrial waste oil emulsion liquid applied to soil.
- Conducted experiments to investigate the role of forest soils in the production of methane, ethylene, and other greenhouse gases.
- Performed GC and AAS analyses of soil and water samples.
- Supervised work-study and graduate students in the field and laboratory.

Zane Richard Smith Satterfield P. E.

Rte. 3 Box 141.

Fairmont, WV 26554

Home Phone (304) 363-4313

Work Phone: (304) 293-6586

Qualifications

Registered Professional Engineer P.E. W.Va. Registered 07-27-01 Registration Number 14878

Certified Licensed (1D) public water system operator in the state of West Virginia License # WVOP09588

23 years experience in civil engineering, including surveying (conventional and GPS), highway design, traffic, water and sewer systems, either, collection, distribution and storage, or treatment, storm water management, wetland delineation and mitigation, structural detailing, AutoCAD 12, 13, 14 & 2000 and Micro station.

Employment

ENGINEERING SCIENTIST

(November 2003 - PRESENT)

West Virginia University,

National Environmental Services Center

NRCCE building, Evansdale Campus

PO Box 6064

Morgantown, WV 26506

Supervisor: Gerald Iwan, Ph.D.

Phone: (1-800-624-8301)

- Serves as an experienced, professional engineer to supply technical assistance for callers to NESC's hotline. Questions concern all aspects of wastewater, water sources, protection, collection, treatment, distribution and conservation; for example: facility design, operation, maintenance, performance, management, cost, energy consumption, financing, governing regulations, facility locations, and pertinent contacts.
- Identifies, collects, and reviews information and potential sources of data related to innovative and alternative wastewater and water system technologies for various technical databases. Assists with the development of new databases;
- Develops research proposals on small community environmental infrastructure;
- Responds as Principle Investigator (PI) or Co-Principal Investigator to request for proposals (RFPs) to diversify NESC services; and conducts research.
- Collaborates with other Engineer/Scientists in providing oversight of technical matters related to community needs;
- Visiting small communities to provide general technical assistance and assess water collection, treatment and distribution needs and identify alternative solutions to solving identified problems;
- Contributes articles on technical and other relevant issues for newsletters, magazines, or other publications or products; identifies topics, researches, and prepares other relevant technical articles for inclusion in magazines, newsletters, and/or in other publications or products; serves as a reviewer;
- Interacts with technical staff to plan and offer a variety of services on the WEB sites;
- Provides monthly status reports on specific technical services provided and other relevant services;
- Prepares and presents technical information at national, regional state and local conferences.

DISTRICT ENGINEER

West Virginia Bureau For Public Health

(May 2001 – November 2003)

209 South Main Street
Environmental Engineering Division
Philippi, WV 26416
Supervisor: Craig Cobb
Phone: (304-457-2296)

- Reviewed and inspected public water and sewer systems for the state of West Virginia DHHR District 6. Field and office work from review, inspection, and final reports, including site visits, site inspections, and sanitary surveys.
- Enforced State and Federal codes and Regulations (SDWA) on drinking water and operator regulations.
- Collected water samples at regulatory checks for bacteriological reports. Water analysis in the district laboratory on raw and treated water samples; wrote detailed reports on water systems; conducted survey with GPS and compiled water systems map.

ASSISTANT ENGINEER
City Of Fairmont Engineering Department
Fairmont, WV 26555
Supervisor: Jim Fetty
Phone: (304) 366-0540

(January 1999 – May 2001)

- Engineering design and detailing, compiled survey information for reference and guidance on office design. Investigated water and sewer projects for the city.
- Decided methods of executions and suitability of materials.
- Conducted investigations demanding resourcefulness and originality to write plans, write specifications and direct drafting and computations of engineering work.

ENGINEER TECHNICIAN
McMillen Engineering
Uniontown, PA 15401
Supervisor: Terry McMillen
Phone: (724) 439-8110

(October 1989 – January 1999)

- Field survey corp., drafting, design and detailing, courthouse research, structural detailing.
- Land development and storm water management.
- Made plans, wrote specifications, and directed drafting and computations.

Education

BACHELOR OF SCIENCE IN CIVIL ENGINEERING TECHNOLOGY
Fairmont State College
Fairmont, WV 26554

(8/84 - 5/89)

- Cum Laude

ASSOCIATE OF SCIENCE IN MECHANICAL ENGINEERING TECHNOLOGY
Fairmont State College
Fairmont, WV 26554

(8/84 - 5/89)

- Honors

ASSOCIATE OF APPLIED SCIENCE IN ENVIRONMENTAL ENGINEERING TECHNOLOGY
Fairmont State College
Fairmont, WV 26554

(8/84 - 12/00)